



## 2018 Meeting Minutes Toll-Free Phone Line Project Committee

- March 22-23, 2018
- April 10, 2018
- May 8, 2018
- June 12, 2018
- July 10, 2018
- Aug. 14, 2018
- Sept. 11, 2018
- Oct. 8, 2018
- Nov. 13, 2018

---

### Toll-Free Phone Line Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes March 22, 2018

#### **Attending TAP Staff**

- Cedric Jeans, Designated Federal Official (DFO) –TAP
- Rosalind Matherne, Analyst – TAP
- Otis Simpson, Analyst – TAP

#### **Attending TAP Members**

- Alice Azarro
- Angel Hower
- Tim Bolin
- Alyssa Burrows
- Zanolbia Oliver
- Stephen H. (Steve) Vanderver
- Phillip "Phil" Kleiber
- Bernard V. Peterson
- Bruce W. Stratton
- Diana Nelson (via teleconference)

#### **Absent TAP Members**

- Kimberly Pierre

#### **IRS Employees**

- Tamikio Bohler – Wage & Investment Program Analyst



### **Welcome/Announcements/Review Agenda**

DFO Cedric Jeans greeted the participants and officially opened the meeting.

### **Self-Introductions/Roll Call**

The attending TAP members introduced themselves and provided background.

### **TAP Mission**

Jeans went over the TAP mission. Jeans provided examples of outreach the members can do to achieve the mission. Jeans went over the TAP vision. He talked about the TAP Charter and how the commissioner provides resources to the program that enables it to achieve its mission. Jeans talked about the Annual Report and how the commissioners and other organizations read the reports and how the program tries to drive people to read the annual report. Spoke about Taxpayer Advocate Service (TAS) and the National Taxpayer Advocate (NTA) and the NTA Annual Report to Congress (ARC) and the areas the resources ARC covers. Matherne informed the committee she will send copies of the ARC. Simpson informed the members the ARC is posted on [www.ImproveIRS.org](http://www.ImproveIRS.org). Oliver asked if the IRS has statistics on the demographic of people who come into the TAC.

Jeans spoke about TAP success stories. Volunteer Income Tax Assistance (VITA) quality was approved. VITA longer extension was achieved through a recommendation from TAP.

Jeans went over the program responsibilities and how the program works grassroots issues and projects from the IRS and TAS.

Jeans covered TAP issues and the program screens issues and drops issues. Jeans talked about the issues should focus on IRS customer service improvements.

### **Staff Support**

Jeans informed the members the staff provides research and analysis of issues.

### **TAP Meeting Procedures**

Matherne covered the ground rules of TAP meetings. Informed the members of the methods of communication the TAP program uses to conduct meetings (conference calls, WebEx, email).

### **So You Want to Be A Chair?**

Tim Bolin, the 2017 the Toll-Free Phone Line Project Committee chair, provided the members his 2017 experience on being the chair.



Alice Azarro provided the members her experience on being the 2017 vice chair of the Toll-Free Phone Line Project Committee. Azarro informed the members that the main responsibilities are outreach and backing of Tim Bolin who was the chair.

Bolin, Azarro, Oliver and Burrows gave their campaign speeches.

### **Nominations**

Bolin and Azarro were nominated for chair. Bolin and Azarro accepted the nominations.

Azarro nominated Oliver. Burrows accept the nomination for vice chair from Angel Hower.

The committee voted for the 2018 chair and vice chair.

### **Election Results**

Azarro won the Toll-Free Phone Line 2018 chair nomination and Zanobia Oliver won the vice chair nomination.

### **Establish Quorum & Consensus**

Jeans went over quorum is and what it means. Jeans provided the equation that for 10 members, quorum would be 50 percent plus one. For the Toll-Free committee meeting quorum would be six. Consensus.

### **Approval of November 2017 Minutes**

The minutes previously distributed were reviewed and approved.

### **Establishment of Sub Committees and Meeting**

Full committee meeting – Second Wednesday of the month at 3 p.m. ET.

Subcommittee 1 – First Tuesday of the month at 2 p.m. ET

Subcommittee 2 – First Monday of the month at 4 p.m. ET

Quality Review – Bruce Stratton, Bernie Peterson, Stephen Vanderver

Internal Communications – Angel Hower, Alice Azarro, Zanobia Oliver

Outreach – Zanobia Oliver

Screening Committee – Tim Bolin (lead), Alyssa Burrows, Phil Kleiber, Diana Nelson

### **Screening Committee Overview**

Matherne went over the process of screening an issue and what an issue is.

Jeans added information on systemic issues, issues that have been raised by the NTA. Matherne spoke about the parking lot status assigned to certain issues.

Jeans and Matherne expounded about requesting guidance from full committee and researching an issue and calling in a Subject Matter Expert.



### **IRS Project Committee Work Liaison (Tamikio Bohler)**

Tamikio Bohler gave an overview on Wage and Investments (W&I) and its goal and mission. Largest operation division. Bohler gave an overview of the two Federal Advisory Committee Act committees sponsored by W&I. They are IRS Advisory Council (IRSAC) and Information Reporting Program Advisory Committee (IRPAC). IRSAC is working on the validity of third party organizations. IRPAC advises.



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 23, 2018**

**Attending TAP Staff**

- Cedric Jeans, Designated Federal Official (DFO) – TAP
- Rosalind Matherne, Analyst – TAP
- Otis Simpson, Analyst – TAP

**Attending TAP Members**

- Alice Azarro
- Angel Hower
- Tim Bolin
- Alyssa Burrows
- Zanobia Oliver
- Stephen H. (Steve) Vanderver
- Phillip “Phil” Kleiber
- Bernard V. Peterson
- Bruce W. Stratton
- Diana Nelson (via teleconference)

**Absent TAP Members**

- Kimberly Pierre

**IRS Employees**

- Tamikio Bohler – Wage & Investment Program Analyst

**Welcome/Announcements/Review Agenda**

Jeans welcomed the TAP members and officially open the meeting. Jeans gave an overview of the committee’s project work from yesterday.

Jeans went over the Affordable Care Act (ACA) line review and passed out the scrip to the committee. The committee called the ACA line and listened to the line. The TAP members briefly discussed what they the heard on the line.

Jeans called the 1040 line and the members listened to the 1040 line. The members had an open discussion amongst themselves regarding the 1040 line. Jeans released the members to break into their subcommittees to work on their current projects.

**Subcommittee 1 Report Out**

- Issue: 36641 PDC
- Add Voice Recognition – Azarro said this task has been completed



- Privacy Statement
- Law Statement
- Suggestive Request Prompt

## **Subcommittee 2 Report Out**

Quality Voice Review

## **Review of Elevated Projects**

### **ID 35872 Online Navigation**

- IRS assigned project to get taxpayers to develop a script to direct taxpayers to online resources. Include public service announcements.
- IRS needs until March 6, 2018 to respond. Jeans will follow up with the IRS.

## **IRS Responses Received**

### **ID 35594 Fire Toll Line**

- Tim Bolin provided an overview of the recommendation centers around the Fire Line. Fire line is where the professionals have to upload to 1099 information. It is the information return line.
- IRS agreed with the recommendation and changed the script to reflect the committee's recommendation. Implementation August 2018. Committee voted to accept the IRS acceptance. No opposition.

### **ID 36206 Area Code/Time Zone Restrictions**

- The recommendation was under consideration. The IRS rejected the recommendation. The subcommittee determined to prepare a rebuttal to the IRS response, to recommend that the script state that business hours are based on the caller's area code.

## **New Issue Screening Training**

- Issue 36452 – The committee decided to drop the issue, because it is illegal
- Issue 36326 – The committee decided to drop the issue, because it is not the ITIN line but the practitioner priority line
- Issue 36544 – The committee tested the line and it the hold time was not long. The committee agreed to drop it.
- Issue 36247 – The committee will place it in the parking lot

## **Meeting Assessment/Travel/Next Steps/Closing**

Jeans summarized the meeting and addressed any concerns the members might have. Jeans informed members to contact Matherne for all committee needs. Jeans addressed administration issues and Matherne collected direct deposit forms.

Jeans closes the meeting at 11:45 a.m. ET.



***These minutes have been approved and certified by the committee chairperson.***



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 10, 2018**

**IRS Staff**

- Debra Awalt – W&I Program Coordinator & Support Services
- Rose A. Babb, Management Assistant – TAP
- Tamikio Bohler –W&I Operations Support
- Terrie English, Director – TAP (Absent)
- Cedric Jeans, Program Manager – TAP East
- Rosalind Matherne – TAP Analyst

**TAP Members**

- Alice Azzaro – Wellington, FL
- Timothy Bolin – Cheyenne, WY (Absent)
- Alyssa Burrows – Kingston, PA (Absent)
- Angel Hower – Norwal, IA (Absent)
- Philip Kleiber – Roswell, GA
- Diana Nelson – Mason, OH
- Zanobia Oliver – Box Elder, SD
- Bernard Peterson – Cazenovia, NY
- Bruce Stratton – Boise, ID
- Stephen Vanderver – Evansville, IN

**Opening**

Jeans, officially opened the administrative meeting and welcomed the members. This meeting was pursuant to the face-to-face meeting in March. Because this meeting was administrative, and not published in the Federal Register for the public to attend, no decisions were made on the minutes or other issues to be voted on.

**Welcome/Announcements**

Azzaro, the elected Chair of the 2018 Toll Free Project Committee, welcomed everyone and proceeded with the agenda. She stated that the face-to-face meeting in March was very productive and, she asked the new members if they have any concerns and questions, please reach out to her or Matherne, the analyst for the committee.

The full committee meeting is scheduled for the second Tuesday of each month at 3-4 p.m. ET. An email will be sent out to confirm that this is the standing time each month. Placing phones on \*6 to mute and unmute when speaking was discussed.





The New Withholding Calculator for 2018 is available at the [www.IRS.gov](http://www.IRS.gov); Azzaro invited the members to visit the site and read about it. She also encouraged the members to inform the public of this tool available to facilitate them in any adjustments to their W-4 Form. Azzaro mentioned that members can mention the calculator during outreach events or any informal contact with taxpayers.

### **National Office Report**

Jimerson was the Acting TAP Director for Terrie English. She welcomed the new and returning members and had a few announcements:

- The recruitment season for the TAP Year 2019 is open until April 27, 2018, for new and alternate members from various states across the country. An email will be sent out to all members soliciting their assistance to the TAP staff for the interview process which begins June 4, 2018, to June 29, 2018. The schedule for interviews are from 8 a.m. to 5 p.m. ET; volunteers will be accommodated based on their schedule.
- The TAP survey sent via email to members are due to Jeans by April 25, 2018. This survey is very helpful to the members and staff on various ways to improve the TAP Program and Regional face-to-face meetings.
- Copies of the 2017 TAP Annual Report are being mailed to all TAP members.
- The Joint Committee will have its first meeting of the year on April 25, 2018 at 1-2:30 p.m. ET. Jimerson invited the new members to join (listen/participate) if they can to see how decisions and referrals are made.

### **DFO Report**

- Jeans encouraged the new members to use the press release template in the Outreach toolkit on TAPSpace to distribute notification regarding their appointment to the panel. If the members need assistance, they should contact their mentors or the analyst of their committee.
- Business cards will be mailed within the next week for new and returning members who requested a new supply.
- New members should begin reaching out to their mentors, to facilitate their transition in to the TAP.

### **Travel Voucher Funds Reimbursement**

The members were informed that the travel reimbursement process is moving along, some members were paid and the other members will receive their



deposits within the next week. If anyone has any concerns, they should contact Babb.

### **Outreach Activity**

Oliver mentioned most of the committee have returned their outreach report for the month of March. She reiterated that they should continue to notate their time, via email, one on one contact or any other form of outreach that was conducted to ensure that they receive the appropriate credit.

Kleiber mentioned that he will be working jointly with the Local Taxpayer Advocate (LTA) in his home state of Georgia next week on an outreach event.

Azzaro stated that outreach can be social media, sitting next to someone at a public event, just to name a few examples of how to reach out to the public.

### **Subcommittee 1**

Further discussion on Issue 36641 (Private Debt Collection)

- Referring to TAS may be premature
- May undermine the intent of Congress
- List of questions for IRS Subject Matter Expert (SME)
- May better be served by Notices and Correspondence

Working on Issue 37269 (Voice Recognition)

- Requesting IT/Toll-Free SME
- Need to consider holistic view of telephone system before moving forward

### **Subcommittee 2**

- Further work on rebuttal of Issue 36206 regarding area code and time zone issues with call center hours
- New Issue 37379 – Script Errors
  - After hours message refers to high call volume
  - There is a need for general improvement of toll-free scripts (i.e. Announcement 58131)
  - Requesting SME input

### **Action Items**

1. Subcommittee 1 will be reviewing IRS Response to Issue 35872; they plan to rework it and resubmit it for reconsideration.
2. Name badges and business cards will be sent out to members in another week.
3. Continue to conduct outreach and send in activity reports each month.
4. SME requested for next full committee meeting to discuss issues regarding the possibility having Voice Recognition on the Toll-Free Line.



5. March face-to-face minutes will be voted on at the May meeting.

**Closing**

Jeans thanked all for joining the call.

**The next full committee teleconference call will be on Tuesday, May 8, 2018 at 3 p.m. ET. 1-888-331-8226; Access Code 1122046**

***These minutes have been approved and certified by the committee chairperson.***



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 8, 2018**

**IRS Staff Present**

- Rose A. Babb, Management Assistant - TAP
- Tamikio Bohler –W&I Operations Support
- Terrie English, Director – TAP (Absent)
- Cedric Jeans, Program Manager, DFO
- Rosalind Matherne - TAP Analyst
- Rosemary Rixey – Policy Analyst

**IRS Staff Absent**

- Debra Awalt – W&I Program Coordinator & Support Services

**Members Present**

- Alice Azzaro, Wellington, FL
- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN

**Members Absent**

- Timothy Bolin, Cheyenne, WY

**Opening**

Jeans, officially opened the meeting and welcomed the members. Quorum was met for this meeting.

**Approval of Minutes**

The minutes for March and April were approved for posting to [www.improveirs.org](http://www.improveirs.org).

**Welcome/Announcements**

Azzaro, welcomed all and proceeded with the agenda. She mentioned that the TAP recruitment has been extended until May 11, 2018. She asked the members to reach out to their friends and neighbors in those states with low recruitment responses and invite them to apply for the volunteer positions posted on [USAJobs.gov](http://USAJobs.gov).

**National Office Report**



English welcomed everyone and thanked the members for the assignments that they have committed to working through November. She did not have any new reporting from National Office for this meeting.

### **DFO Report**

Jeans stated the following:

- If members are interested in conducting outreach events via Web Ex, the TAP staff can facilitate this request. Members will need to provide the TAP staff analyst with the email addresses of the participants to coordinate the event. Jeans also stated that these events cannot be accommodated beyond the TAP staff tour of duty schedule (Monday through Friday, 8:00 a.m. - 4:30 p.m.).
- The members were invited to subscribe to IRS news releases; it is helpful with professional and personal projects; there are various subscriptions that members can subscribe to.
- TAP will be starting up once again the quarterly IRS Awareness topics discussion in a few weeks; a calendar invitation will be sent out for quarterly sessions. Various tax topics (Appeals; Earned Income Tax Credit; Offer and Compromise; and Collections to name a few) are discussed and members can submit topics for discussion as well.
- The annual tax forum season is now starting up. For those members who are interested and reside within the event location, permission must be requested and, if necessary, overnight lodging may be considered. Jeans asked the members interested to contact [Gilbert.JF.Martinez@irs.gov](mailto:Gilbert.JF.Martinez@irs.gov). Below is the Tax Forum Schedule:



## How Do I Register?

Visit the [IRS Nationwide Tax Forums](#) website now to register.

IRS Nationwide Tax Forums 2018 Locations and Dates		
ATLANTA, GA	Atlanta Marriott Marquis	July 10 - 12
WASHINGTON, DC	Gaylord National Hotel and Convention Center	July 17 - 19
SAN DIEGO, CA	Town and Country Resort	August 7-9
CHICAGO, IL	Hyatt Regency Chicago	August 21 - 23
ORLANDO, FL	Hyatt Regency Orlando	September 11 - 13

### **Outreach Activity**

Oliver mentioned that she has received all outreach activity reports for the month of April; she reminded the members to share with her email updates on any contacts they have made with their Local Taxpayer Advocate(LTA) and how things are moving along.

### **Subcommittee 1**

#### **Private Debt Collection, PDC - Toll Free Line**

Kleiber reported that the Subject Matter Expert (SME) on the subcommittee will provide statistics on current call volume but, historically, it's been 3,000 calls per month. Taxpayer Advocate Services(TAS) and Low Income Taxpayer Clinic's information was addressed in the Private Debt Collection(PDC) publication and TAS information is in the CP40 notice. The SME also indicated that taxpayers would prefer to speak to a live assistor even if it's a PDC and that changing notices and prompts are costly.

#### **Voice Recognition for Toll Free Lines**

The IRS is moving from hard lines to Voice Over Internet Protocol (VOIP) with web-based software; the new software can be upgraded with "packages" for voice recognition, authentication retention, and callback technology. The focus is to work with lawmakers to get the funding to address these issues.

### **Subcommittee 2**

#### **Area Code Time Zone Restrictions**

Vanderver stated that the SME on the subcommittee call mentioned that the discussion of script revision must be more accurate to reflect hours of operation. Vanderver also mentioned that the SME also stated that new technology may allow for use of state codes instead of area codes. The recommendations will be sent to the quality review.

### **After Hours script**

The script is not in the right order; the SME will send the script for review.

The subcommittee will have a discussion on potential new issues since there are no more issues in the inventory that are workable now.

### **Action Items**

6. Azzaro provide the website <https://www.ptpinc.com/glossary/call-center-technology-101>; she suggested that members look at the site for potential techniques that can enable the process of building new issues for toll free line projects. Azzaro asked that the members provide feedback on what is useful and not useful. The screening committee will be setup within two weeks to work on this as a project.
7. Azzaro will be visiting Capitol Hill to meet with a few congressmen next week, she asked members to contact her via email with any questions or concerns they may have to be part of her discussion.
8. Business cards and name badges will be mailed out by next week.
9. Continue to conduct outreach and send in activity reports by the twenty-fifth day of each month.

### **Closing**

Azzaro thanked the members for joining the call and Jeans declared the meeting closed.

**The next full committee teleconference call will be on Tuesday,  
June 12, 2018 at 3:00 pm EST. 1-888-331-8226 Access Code 1122046**

***These minutes have been approved and certified by the committee chairperson.***



**Toll-Free Phone Line Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 12, 2018**

**IRS Staff Present**

- Kevin Brown – Management Assistant - TAP
- Cedric Jeans – Program Manager, DFO
- Pamela Lowe – W&I Operations Support
- Gary Lindsey – W&I Tax Analyst
- Rosalind Matherne – TAP Analyst

**IRS Staff Absent**

- Debra Awalt – W&I Program Coordinator & Support Services

**Members Present**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY
- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN

**Opening**

Jeans officially opened the meeting and welcomed the members. Quorum was met for this meeting.

**Approval of Minutes**

The Minutes for May were approved for posting to [www.improveirs.org](http://www.improveirs.org) with one change to Angel Hower's city from "Norwal" to Norwalk.

**Welcome/Announcements**

Azzaro welcomed all and proceeded with the agenda.

**National Office Report/ DFO Report**

Jeans welcomed everyone to the call and spoke about the interview part of the recruitment project. The interviews should be over by the first week in July, but if it goes later we may need more assistance with the interviews. Jeans reported that Martinez is heading the Tax Forum project and Azzaro and Kleiber will be attending from this committee. Jeans reminded the committee about the Joint





Committee (JC) face to face meeting and welcomed ideas of what the committee should focus on during this meeting. Send any suggestions about the withholding calculator to Azzaro or Rosalia to be sure it is working correctly.

### **Outreach Activity**

Oliver spoke about getting issues from taxpayers and sending them forward right away instead of later. The inventory is really low so we have to continue to collect issues to be screened. Oliver reported that the social media outreach is expanding by other members which is a good thing. Be sure the Activity Reports are correct and input since there may be an issue with them being received according to Azzaro. Oliver and Azzaro will review this issue in a month or so.

### **Subcommittee 1**

#### **Issue #36641**

Was declined after speaking to the subject matter expert (SME).

#### **Issue #37269**

Azzaro reported that Issue 37269 was split into three issues to be reworked to support recommendations on how to get the funding added by the IRS for those services. There was also a focus to have consistency with the messages.

### **Private Debt Collection, PDC – Toll Free Line**

Vanderver reported 36206 is being rebutted and passed on to the JC.

### **Subcommittee 2**

#### **Area Code Time Zone Restrictions**

Issue 37269 is being worked by having someone review each of the five scripts:

Script 1- 640 Peterson

Script 2- 800 829-0922 Bolin

Script 3- 866 883-0217 Hower

Script 4- 4933 Bur

Script 5- 800 829-0582 Vanderver

Issue 38529 was a personal tax issue regarding a paper filing that required the Taxpayer Advocate Service (TAS). Matherne will transfer this issue to TAS.

#### **Issue closed**

The committee will request statistics regarding phone calls and level of service to Gary Lindsey to be reviewed.

### **Issue 36206- Elevated to the JC**

### **Action Items**

10. Azzaro look for issues throughout your communities.



11. Provide issues to be discussed at the JC face to face.
12. Issue 38529 dismissed report sent to Lindsey.
13. Issue 36641 Tabled.
14. Issue 37269 is currently being worked by Subcommittee 2.
15. Issue 36206 Elevated to JC.
16. Issue 38402 Elevated JC.
17. 38529 Transferred to TAS.
18. Continue to conduct outreach and send in activity reports by the twenty-fifth day of each month.

### **Closing**

Azzaro went to Capitol Hill and spoke to congress about funding the technology for the telephone packages we recommended. Representative Evan Jenkins asked to please implore the Senate to fund it quickly since she is retiring in January. Other members wanted concessions while supporting the bill. A letter for this effort will be posted on [www.tapspace.org](http://www.tapspace.org) for each member to be able to personalize and send to their representatives this week to get specific language to fund these projects. Azzaro said to send this as a constituent not as a member of TAP. Every member is encouraged to send this letter to include any taxpayer.

Awalt reported that the present enhancements to the software will be completed in August, but it is not the same as our current effort.

Azzaro thanked the members for joining the call and Jeans closed the meeting.

**The next full committee teleconference call will be on Tuesday,  
July 10, 2018 at 3:00 p.m. ET.**

***These minutes have been approved and certified by the committee chairperson.***



**Taxpayer Advocacy Panel (TAP)  
Toll-Free Phone Line Project Committee  
Meeting Minutes  
July 10, 2018**

**Staff Present**

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb - Management Assistant
- Gregory Giles – TAP Analyst
- Rosalind Matherne - TAP Analyst
- Rosemary Nixey – Policy Analyst
- Robert Rosalia – TAP Analyst

**Staff Absent**

- Cedric Jeans - Program Manager, Designated Federal Official, DFO

**Members Present**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY
- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Bernard Peterson, Cazenovia, NY
- Stephen Vanderver, Evansville, IN

**Members Absent**

- Zanobia Oliver, Box Elder, SD
- Bruce Stratton, Boise, ID

**Opening**

Rosalia was the DFO for this meeting; Jeans was absent attending the Joint Committee (JC) face to face meeting in Jacksonville, FL. Rosalia officially opened the meeting and welcomed the members. Quorum was met for this meeting. There were no members of the public on the call.

**Approval of Minutes**

The minutes for June were approved for posting to [www.improveirs.org](http://www.improveirs.org) with some minor changes.

**Welcome/Announcements**

Azzaro joined the call from the JC Meeting in Jacksonville, FL she provided some highlights from the discussion:



- Private Debt Collection issues will be reworked in the subcommittee.
- Taxpayer Advocate Service (TAS) has some articles on tax reform on the IRS website, members are asked to look at some of the useful outreach tools from the tax reform articles.
- Members are encouraged to update their profiles in [www.TAPSpace.org](http://www.TAPSpace.org); this will be used as a resource directory for all committee members.

### **National Office Report/ DFO Report**

Rosalia welcomed everyone to the call and stated that the recruitment period will be closed soon; there are just a few more interviews to complete. The June Report to Congress has been released and is now available for members to look at on the [www.IRS.gov](http://www.IRS.gov) website.

### **Outreach Activity**

Azzaro provided the outreach report for Oliver. There were 45.9 hours of participation with 29 outreach activities and an audience of 30. Azzaro mentioned that the outreach report represents a low turn out of outreach and asked the members to look at ways they can increase their outreach activities.

Nelson discussed some of her recent outreach events. She stated that she met with all gubernatorial candidates running for office in 2018 (Mary Taylor, Jon Husted and Richard Cordray). Nelson mentioned that Mary Taylor has expressed an interest in implementing a similar program like the TAP outreach for Ohio. Nelson also stated that she has a tax conference in Columbus on Thursday, July 12 to discuss TAP.

Kleiber joined the call from the Atlanta Tax Forum. He stated that there were 2100 in attendance and that as far as TAP recruitment, there is a lot of interest. Kleiber mentioned that TAP should develop some specific information on recruitment that would be helpful to generate interest at these types of events.

### **Subcommittee 1**

**Issue #37269** was divided into three issues, one for each of the telephone technologies (authentication retention, callback technology, and voice recognition), in the June meeting. However, information provided by the Subject Matter Expert (SME) and committee members at the July meeting put into question the necessity of the three referrals. Further research and editing is being done for next month's meeting. There was further discussion on two potential new issues: free file and chat technologies. Further research and new referrals will be worked on for the next meeting.

### **Subcommittee 2**

**Issue #36206** -- We continue to review this issue to determine if a new issue or another rebuttal is required. Additionally, the flow of phone scripts is being



reviewed and some of the toll- free numbers called to test the script accuracy. This research may lead to further issues in the future.

**Closing**

Azzaro thanked the members for joining the call and Rosalia declared the meeting closed.

**The next full committee teleconference call will be on Tuesday,  
August 14, 2018 at 3:00 p.m. ET.**

***These minutes have been approved and certified by the committee chairperson.***



**Taxpayer Advocacy Panel (TAP)  
Toll-Free Phone Line Project Committee  
Meeting Minutes  
August 14, 2018**

**Staff Present**

- Rose A. Babb - Management Assistant
- Terrie English – TAP Director
- Gregory Giles – TAP Analyst
- Cedric Jeans - Designated Federal Official, DFO
- Pam Lowe - W&I Analyst
- Rosemary Nixey – Policy Analyst

**Staff Absent**

- Debra Awalt – W&I Program Coordinator
- Rosalind Matherne - TAP Analyst

**Members Present**

- Alice Azzaro, Wellington, FL
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN

**Members Absent**

- Timothy Bolin, Cheyenne, WY
- Alyssa Burrows, Kingston, PA

**Members of the Public**

- Paul Merrion

**Opening**

Jeans welcomed everyone and declared the meeting opened.

**Approval of Minutes**

The minutes for July were approved for posting to [www.improveirs.org](http://www.improveirs.org).

**Welcome/Announcements**

Azzaro welcomed everyone and made a few announcements:



- The TAP 2018 year is coming to an end; the subcommittees should begin reviewing those referrals that can be finalized and sent to the Joint Committee (JC) before TAP's final meeting for the year in November.

### **National Office Report/ DFO Report**

English welcomed everyone to the call. She stated the TAP quarterly call has been rescheduled for September 20, 2018, at 2:00 pm EDT. The members are asked to contact the analyst of the committee with any issues they would like to include on the agenda for that call.

### **DFO Report**

Jeans mentioned that the Chicago Tax Forum is August 21, 2018, through August 23, 2018; if there are any TAP members residing in that area, they should consider attending the forum to conduct outreach for the TAP.

TAP is looking at the Future State Online services; Jeans asked the members to look at issues that may be related to the changes. If there are any issues, the members should write it up as a possible project and sent it to him, Azzaro and Matherne.

Jeans reiterated that TAP is moving into the new recruitment period of 2019 in just a few months. He asked the members to feel free to recommend friends and outreach participants to apply for the TAP volunteer positions particularly in those states that have a low recruitment participation.

### **Outreach Activity**

Oliver stated the following:

- Almost all outreach activity reports were turned in. She mentioned a social media post on [www.TAPSpace.org](http://www.TAPSpace.org) that has lots of information on tax reform changes. Oliver mentioned that the posting is very easy to understand and she suggested to members to look at it and share it with others as well.
- Nelson mentioned that the Vice President of the United States was in Ohio to promote tax changes; she stated that for the future, TAP should try to find out if any events like this is in their area because it is a good place to for TAP outreach.
- Kleiber mentioned that he is working with Taxpayer Advocate Services (TAS) at a booth on August 30-31, 2018, at a South-East Accounting event for CPAs and Tax Practitioners.

### **Subcommittee 1**

Kleiber reported that his subcommittee is updating the call back technology; Giles provided information that the IRS Joint Operations Committee (JOC) has



evaluated a call back technology project but currently awaiting funding. Kleiber stated that the subcommittee will go ahead and finalize the referral to help give so weight to the current project waiting funding. The subcommittee also received some data on reaching a live person. Azzaro mentioned that these statistics will be part of the referral write up. This referral will be finalized for the next full committee call.

Kleiber also mentioned that the IRS can do a better job on the free file marketing; the subcommittee has some ideas of messaging on the toll-free line that they will write up a as proposal for next month.

### **Subcommittee 2**

Vanderver stated that his subcommittee did not find anything significant on the referral form for the toll-free line except for the time zone closings for the IRS offices. This subcommittee is working on a referral to include time zone messaging on the toll-free lines.

### **Screening**

Azzaro mentioned that there are lots of issues in the inventory log; she asked the members to do a review and see if there are any issues they would like to work on. Azzaro also mentioned that the members can go out to the community and see what they can work on either toll free or solicit other common channels to find issues.

### **Action Items**

- Work on closing out those referrals that can be submitted to the JC in the next few months before the end of the TAP year.
- Visit the IRS site at <https://taxchanges.us>; it is user friendly and does provide answers to basic tax questions.

Azzaro thanked the members for joining the call and Jeans declared the meeting closed.

**The next full committee teleconference call will be on Tuesday,  
September 11, 2018 at 3:00 p.m. ET.**

***These minutes have been approved and certified by the committee chairperson.***





**Taxpayer Advocacy Panel (TAP)  
Toll-Free Phone Line Project Committee  
Meeting Minutes  
September 11, 2018**

**IRS Staff**

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb - Management Assistant
- Terri English – TAP Director
- Cedric Jeans, Designated Federal Official, DFO
- Pam Lowe, - W&I Analyst
- Rosalind Matherne - TAP Analyst
- Rosemary Nixey – Policy Analyst (Absent)
- Tracy Rohrs – Program Analyst

**IRS Staff Absent**

**Members Present**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY
- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN

**Members Absent**

- Bernard Peterson, Cazenovia, NY

**Members of the Public**

- Paul Merrion

**Opening**

Jeans welcomed everyone and declared the meeting opened.

**Approval of Minutes**

The minutes for August were approved for posting to [www.improveirs.org](http://www.improveirs.org).

**Welcome/Announcements**

Azzaro welcomed everyone. She joined the call from the Florida Tax Forum in Orlando. She made a few announcements:



- Many issues were given to Azzaro at the tax forum; those issues will be sent to Matherne to share with the committee for screening.
- The TAP annual report is currently being worked on; if members would like to contribute an article or anything else, they should contact Azzaro via email.
- The TAP 2018 year is coming to an end; the subcommittees should begin reviewing those referrals that can be finalized and sent to the Joint Committee (JC) before TAP's final meeting of the year in November.

### **National Office Report/ DFO Report**

English welcomed everyone to the call. She stated that she is visiting the staff in the Washington, DC office this week. She thanked the members for all the referrals that were worked on already for this year. English provided an update on the recruitment selections. The recruitment packet will be given to the National Tax Advocate's (NTA) office by September 26, 2018, and after to the Department of Treasury to confirm and appoint the TAP selections.

### **DFO Report**

- The TAP year will end November 30, 2018. Jeans asked the members to look at any referrals that can be developed and submitted to the JC before the committee adjourns.
- When conducting recruitment in those states with low recruitment, members are asked to promote the recruitment period that opens in April 2019.
- The survey to reconstruct TAP Space was emailed to the TAP members last week. The members are asked to respond to the analyst of their committee with suggestions for improving the proficiency of the database.

Tracy Rohrs is on a detail to TAP, she introduced herself and mentioned that she will be creating an outreach repository that will store outreach resources of existing TAP members. This repository will be resourceful for new TAP members. Rohrs also stated that she will work on coordinating presentations to the Centralized Case Intake Advocates.

### **Outreach Activity**

Oliver stated the following:

- Outreach reports from the committee and some social media posting were received.



- Members can include schools and universities as good sources for outreach/recruitment.
- Kleiber provided a quick overview on his outreach with the TAS at South East Accounting. He mentioned another outreach event he plans to attend with Georgia CPAs.

### **Subcommittee 1**

Subject Matter Expert (SME) attended the meeting and discussed callback technology, voice recognition and authentication retention. As a result, the committee made the following progress:

- Callback technology is a high priority with the service. A pilot program is being tested during filing season 2019, but there is no firm commitment or plan to expand the program to full implementation. The committee will present a referral to the full committee in support of the full funding and implementation of callback technology to underscore the NTA's midyear report that emphasizes the need for this technology.
- Authentication Retention requires a high level of technology that the IRS doesn't have at this time. It would require different systems communicating to one another which is a difficult task. A simpler technology, called Disclosure Retention, is available. More information is being required regarding this technology.
- Voice Recognition for basic number requests is implemented on some lines. A more sophisticated system is a tremendous undertaking that is ranked low by the Joint Operations Committee (JOC) and is not planned in the near future. We are working on a referral to support future adoption of this technology.
- The committee also discussed Free File and have developed a referral for the committee to review next meeting.

### **Subcommittee 2**

- The time zone referral is still swirling. The committee is attempting to obtain additional research to finish this one up.
- A new topic was discussed. The Priority Practitioner line is reported to have an outdated message relating to the statute of limitations. The



committee divided up the tasks for research and writing. After reviewing the script, it's unclear if the script is outdated.

- The committee is now looking for other issues. Cedric reminded the committee that we are trying to expand our scope to an omnichannel focus and to consider other areas, such as the IRS website, for phone issues.

### **Screening**

Bolin mentioned that the subcommittee is still working on screening issues; they did not meet last month and so, a meeting will be scheduled for next week.

### **Action Items**

- The paycheck calculator is a great tool to use on the web, when doing outreach, members are encouraged to inform the public of the calculator this way, the public is aware of the withholding tables.
- Mention the TAP 2019 recruitment when conducting outreach in your local communities.
- Remember to submit your suggestions via email for improving TAP Space database.
- Note calendars for the ALL TAP Meeting on September 20, 2018, at 2:00pm EST.
- Members will contact Azzaro with any contributions they may have for the TAP Annual Report.

Azzaro thanked the members for joining the call and Jeans declared the meeting closed.

**The next full committee teleconference call will be on Tuesday,  
October 9, 2018 at 3:00 p.m. ET.**

***These minutes have been approved and certified by the committee chairperson.***



**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel, (TAP)  
Meeting Minutes  
October 9, 2018**

**Staff Present**

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb - Management Assistant
- Tamiko Bohler- Program Analyst
- Terri English – TAP Director
- Cedric Jeans, Designated Federal Official, (DFO) (Absent)
- Gary Lindsey – Senior Tax Analyst
- Pam Lowe, - W&I Analyst (Absent)
- Rosalind Matherne - TAP Analyst
- Rosemary Nixey – Policy Analyst (Absent)
- Tracy Rohrs – Program Analyst
- Otis Simpson, Acting DFO

**Members Present**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY
- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN (Absent)

**Members of the Public**

There were no public participants on the call.

**Opening**

Simpson welcomed everyone and declared the meeting opened.

**Approval of Minutes**

The minutes for September were approved for posting to [www.improveirs.org](http://www.improveirs.org).

**Welcome/Announcements**

Azzaro welcomed everyone and proceeded with the agenda.



### **National Office Report/ DFO Report**

English welcomed everyone to the call. She thanked the members for all the referrals that they have worked so far this year. She mentioned that the TAP Annual Report is being worked on. She also asked the members to continue working on those referrals for the Joint Committee (JC) to review before the TAP year end. English also mentioned that the TAP is working on a virtual TAP graduation for third year members this year.

### **DFO Report**

Simpson was the acting DFO, he provided an update on the recruitment selections. The recruitment packet is now in the National Taxpayer Advocate's (NTA's) office for approval after that, the next approval will be from the IRS Commissioner and then finally to the Department of Treasury who confirms the selections.

### **Outreach Activity**

Oliver stated that she received some outreach reports from the members and, she asked the members to share their outreach experiences:

- Azzaro mentioned that members should consider providing the public the TAP suggestions forms to fill out issues at their outreach events.
- Oliver mentioned that she attended a Day Care Association event and discussed TAP.
- Another suggestion was to consider conducting outreach events at Volunteer Income Tax Assistance (VITA) meetings.

### **Subcommittee 1**

Report out

#### **Issue #36641 -- IRS' Private Debt Collection Toll-Free Line –**

Issue to enhance and expand options that taxpayers are provided when calling the toll-free number 844-875-3420 discussed and should be ready for referral next month.

**Issue #39905 – Utilize Toll-Free Line and potentially other IRS communication vehicles to increase marketing of Free File availability to taxpayers.**

Few taxpayers use the Free File system, which is intended to help low and moderate income filers, while Congress moves to make the program permanent. The key reason taxpayers are not using Free File is because they are unaware of its existence. Issue referred to the JC Committee

**Issue #39906 -Customer Callback (CC) Technology**



In support of the Internal Revenue Service (IRS) Mission Statement<sup>1</sup>, the Toll Free Phone Lines committee makes the following recommendation related to installing and implementing Customer Callback (CC) technology, which will allow taxpayers flexibility in choosing how to spend time waiting to speak with an IRS Customer Service Representative (CSR) over the IRS's toll-free phone lines. Issue referred to the JC Committee.

### **Subcommittee 1**

Subject Matter Expert (SME) attended the meeting and discussed callback technology, voice recognition and authentication retention. As a result, the committee made the following progress:

Callback technology is a high priority with the Service. A pilot program is being tested during filing season 2019, but there is no firm commitment or plan to expand the program to full implementation. The committee will present a referral to the full committee in support of the full funding and implementation of callback technology to underscore the NTA's midyear report that emphasizes the need for this technology.

Authentication Retention requires a high level of technology that the IRS doesn't have at this time. It would require different systems communicating to one another which is a difficult task. A simpler technology, called Disclosure Retention, is available. More information is being required regarding this technology.

Voice Recognition for basic number requests is implemented on some lines. A more sophisticated system is a tremendous undertaking that is ranked low by the Joint Operations Center (JOC) and is not planned in the near future. We are working on a referral to support future adoption of this technology.

The committee also discussed Free File and have developed a referral for the committee to review next meeting.

### **Subcommittee 2**

- The time zone referral is still swirling. The committee is attempting to obtain additional research to finish this one up.
- A new topic was discussed. The Priority Practitioner line is reported to have an outdated message relating to the statute of limitations. The committee divided up the tasks for research and writing. After reviewing the script, it's unclear if the script is outdated.

---

<sup>1</sup> "Provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and enforce the law with integrity and fairness to all." – IRS Mission Statement



- The committee is now looking for other issues. Jeans reminded the committee that we are trying to expand our scope to an omnichannel focus and to consider other areas, such as the IRS website, for phone issues.

### **Screening**

Bolin mentioned the subcommittee is still working on screening issues; they did not meet last month and so, a meeting will be scheduled for October 17, 2018.

### **Action Items**

- Note your calendars for Screening Committee meeting on October 17, 2018, at 3:30 p.m. ET; an email will be sent out to those members who have not received the calendar invitation.
- Continue working on referrals to be elevated to the JC for October and November, the last meeting for the TAP year.
- Continue going into communities to solicit issues for TAP to evaluate for committees to work.
- TAP Chair and Vice Chair elections is coming up; look for the email that provides the date and other information for selecting a new Chair and Vice Chair for 2019 TAP year.

Azzaro and Simpson thanked the members for joining the call and Simpson declared the meeting closed.

**The next full committee teleconference call will be the last call of the year on Tuesday, November 13, 2018 at 3:00 p.m. ET.**

***These minutes have been approved and certified by the committee chairperson.***





**Toll-Free Phone Line Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
November 13, 2018**

**IRS Staff Present**

- Debra Awalt – W&I Program Coordinator
- Rose A. Babb – Management Assistant
- Cedric Jeans, Designated Federal Official (DFO)
- Pam Lowe, – W&I Analyst (Absent)
- Rosalind Matherne – TAP Analyst
- Rosemary Rixey – Policy Analyst

**IRS Staff Absent**

- Tamiko Bohler – Program Analyst
- Terrie English – TAP Director
- Gary Lindsey – Senior Tax Analyst

**TAP Members Present**

- Alice Azzaro, Wellington, FL
- Timothy Bolin, Cheyenne, WY
- Philip Kleiber, Roswell, GA
- Diana Nelson, Mason, OH
- Zanobia Oliver, Box Elder, SD
- Bernard Peterson, Cazenovia, NY
- Bruce Stratton, Boise, ID
- Stephen Vanderver, Evansville, IN

**TAP Members Absent**

- Alyssa Burrows, Kingston, PA
- Angel Hower, Norwalk, IA

**Members of the Public**

N/A

**Opening**

Jeans welcomed everyone to the last full committee call for the TAP year and declared the meeting opened.

**Approval of Minutes**

The minutes for October were approved for posting to [www.improveirs.org](http://www.improveirs.org).

**Welcome/Announcements**



Azzaro welcomed everyone and mentioned that this is the last TAP Toll Free teleconference for the TAP year. She asked Oliver to proceed with the agenda while she was in travel status. Oliver stated the following:

- She congratulated the new Chair – Heidi Hirschfeld and Vice Chair – Patrick Kusiak of the TAP 2019 year. She thanked all those who served the country for their service in observance of Veteran’s Day.
- There is a new IRS commissioner, Charles (Chuck) Rettig.
- There is also a YouTube video of recruitment; members can contact Jeans if they would like more information.

### **National Office Report/ DFO Report**

- Jeans stated that TAP is working on the next face to face meeting for February or March of 2019; the date and location will be forthcoming after the response from the Department of Treasury.
- The TAP Annual Survey will be emailed before Thanksgiving. The members are asked to complete the survey to evaluate their feedback for changes in the TAP.
- The redesign of TAPSpace is being worked on; the site will be up and running before mid-year 2019. TAP is working on having members add their activity reports on line after the redesign completion.

### **Outreach Activity**

Oliver encouraged the members to continue to submit their outreach activity reports. She asked the members to consider sharing their outreach calendars for the new TAP members in their home state. This would be a great source to enable the member to conduct good outreach events.

Nelson and Vanderver shared their outreach experiences recently. Nelson visited with mayors and council members during an outreach in California recently. Vanderver attended his annual Statewide AARP tax program training. He met with two groups comprised of 35 members. He said the discussions were interesting. He gave out business cards, but there were no issues gathered at the event.

### **Subcommittee 1**

Kleiber Reported out that during his subcommittee’s last call on November 8, 2018, they did not have a Subject Matter Expert to discuss Issue# 36641- IRS Private Debt Collection Toll Free line. He indicated that his committee needs more information to finalize their data. A referral is being worked on to ensure that taxpayers are aware of TAS. Kleiber also indicated that this can be used as a spring board for 2019 to improve toll free communications with taxpayers. The committee agreed to move this referral to the Joint Committee for November 29, 2018 calendar.



## **Subcommittee 2**

- Peterson reported that his subcommittee is working on Issue #40124 to recommend that taxpayers be given a call back from telephone assistors when they are disconnected. Peterson indicated that this should be a standard operation for all call centers to follow.
- Rixey indicated that the IRS has the approval to test this procedure on a small scale.
- The committee agreed to move this referral to the Joint Committee for November 29, 2018 calendar.

## **Closing**

Jeans, Awalt, Rixey and Matherne thanked the members and those rotating off for their service to the TAP for the last three years.

The members also thanked each other for the team work they have done together.

The rotating off members, Bolin, Hower and Nelson thanked their fellow members and the staff for their support.

Azzaro and Jeans thanked the members for joining the last call and Jeans declared the meeting closed.

**The next full committee teleconference call will be in 2019;  
(Dates and Time to be determined)**

***These minutes have been approved and certified by the committee chairperson.***